



Filing ID #10022912

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Shawn Nelson  
**Status:** Congressional Candidate  
**State/District:** CA39

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/15/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401A ⇒ Fidelity Investments, 100% Interest [OT]  DESCRIPTION: 401A Retirement Plan	JT	\$175,915.00	Tax-Deferred		
457(b) Retirement ⇒ Fidelity Investments, 100% Interest [OT]  DESCRIPTION: 457(b) Retirement Fund	JT	\$291,089.00	Tax-Deferred		
Aetna Inc. (AET) [ST]	DC	\$2,864.80	Dividends	\$1 - \$200	\$1 - \$200
Amgen Inc. (AMGN) [ST]	DC	\$3,140.64	Dividends	\$1 - \$200	\$1 - \$200
Deere & Company (DE) [ST]	DC	\$3,789.24	Dividends	\$1 - \$200	\$1 - \$200
Honda Motor Company, Ltd. (HMC) [ST]	DC	\$68.72	Dividends	\$1 - \$200	\$1 - \$200
Intel Corporation (INTC) [ST]	DC	\$2,013.18	Dividends	\$1 - \$200	\$1 - \$200
Land [RP]  LOCATION: Riverside, CA, US	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Land in Winchester, California					
Rizio & Nelson Inc. ⇒ French Street Apartments [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$50,001 - \$100,000
LOCATION: Santa Ana, CA, US DESCRIPTION: Apartment Building 1428 French Street Santa Ana, CA 92701					
Rizio & Nelson Partnership ⇒ Office Building [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$50,001 - \$100,000
LOCATION: Riverside, CA, US DESCRIPTION: Apartment Building owned by Rizio & Nelson Partnership located at 3890 Tenth Street Riverside, CA 92501					
Stocks and Mutual Funds ⇒ American Funds Capital Income Builder A [MF]	JT	\$1,338.38	Dividends	\$1 - \$200	\$1 - \$200
Stocks and Mutual Funds ⇒ American Funds Fundamental Investors A [MF]	JT	\$4,290.53	Dividends	\$1 - \$200	\$1 - \$200
Stocks and Mutual Funds ⇒ American Funds Growth Fund A [MF]	JT	\$2,854.24	Dividends	\$1 - \$200	\$1 - \$200
Stocks and Mutual Funds ⇒ American Funds Wmu Investors A [MF]	JT	\$2,932.23	Dividends	\$1 - \$200	\$1 - \$200

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Orange County Transit Authority	Salary	\$1,295.00	\$3,885.00
County of Orange, California	Salary	\$54,000.00	\$162,158.00
Lutheran High School	Spouse Salary	\$3,442.00	\$10,328.00
Various clients	Attorney at Law	\$15,000.00	\$90,745.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Southern California Investors, Inc.	3/31/2017	First Trust Deed on 30075 Grand Ave Winchester, CA 92596	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Director	Rizio & Nelson, Inc.
Secretary Treasurer	Rizio & Nelson, Inc.
Partner	Rizio & Nelson Partnership
Supervisor	Orange County California
Chairman	Orange County Transportation Authority.
Chairman	Southern California Regional Rail Authority (Metrolink) r

**SCHEDULE F: AGREEMENTS**

None disclosed.

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

Source (Name and Address)	Brief Description of Duties
County of Orange, California (Santa Ana, CA, US)	Supervisor
County of Orange, California (Santa Ana, CA, US)	Supervisor
Temecula Office Center, LP (Temecula, CA, US)	Legal services
Southern California Investors, Inc (Temecula, CA, US)	Legal services
MVP REIT, Inc (Las Vegas, NV, US)	Legal services
South Coast Air Quality Management District (Diamond Bar, CA, US)	Legal Services

**SCHEDULE A ASSET CLASS DETAILS**

<ul style="list-style-type: none"> <li>401A (Owner: JT) Description: 401A Retirement Fidelity Investments</li> <li>457(b) Retirement (Owner: JT) Description: Retirement Plan Held by Fidelity Investments</li> <li>Rizio &amp; Nelson Inc. (50% Interest) (Owner: JT)</li> </ul>
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LOCATION: Orange, CA, US

DESCRIPTION: 1428 French Street Santa Ana, CA 92701 Apartments

- o Rizio & Nelson Partnership (50% Interest)

LOCATION: Riverside, CA, US

DESCRIPTION: Real Property located at: 3890 Tenth Street Riverside, CA 92501

- o Stocks and Mutual Funds (100% Interest) (Owner: JT)

LOCATION: Orange, CA, US

DESCRIPTION: TD Ameritrade Brokerage Account

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☒ Yes ☐ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Shawn Nelson , 05/15/2018